County Clerk's Guide to Sharepoint

for

Public Service and Centrally Assessed (Franchise) Certifications

Office of Property Valuation

February 2026

Contents

Introduction

This guide has been prepared by the Office of Property Valuation, Division of State Valuation to serve as a guide for County Clerk offices regarding their usage of the Sharepoint site to download and manage certifications from the Public Service and Centrally Assessed Branches, also known as Franchise Certifications. County clerk offices are responsible for providing independent schools, cities, or any other taxing jurisdiction that manages their own billing a copy of the certification. This guide will explain how to access and navigate the Sharepoint site.

Accessing Sharepoint

Only approved local employees and state personnel are granted access. An Active Directory (AD) account and ky.gov email address is required for access. The device used to access the Sharepoint site must be logged into the state network, otherwise the user will not be granted access. To request access for staff please contact Ashley Sheeks at ashley.sheeks@ky.gov.

When access is granted, the user will receive an automated email from the site administrator, like the one below. The email will contain a link to the Sharepoint site.

The Sharepoint site is web based, giving users the option to save the link as an html file or add it to their browser favorites for quick access. The link for the Sharepoint site can be found on the Clerk Network https://revenue.ky.gov/ClerkNetwork.
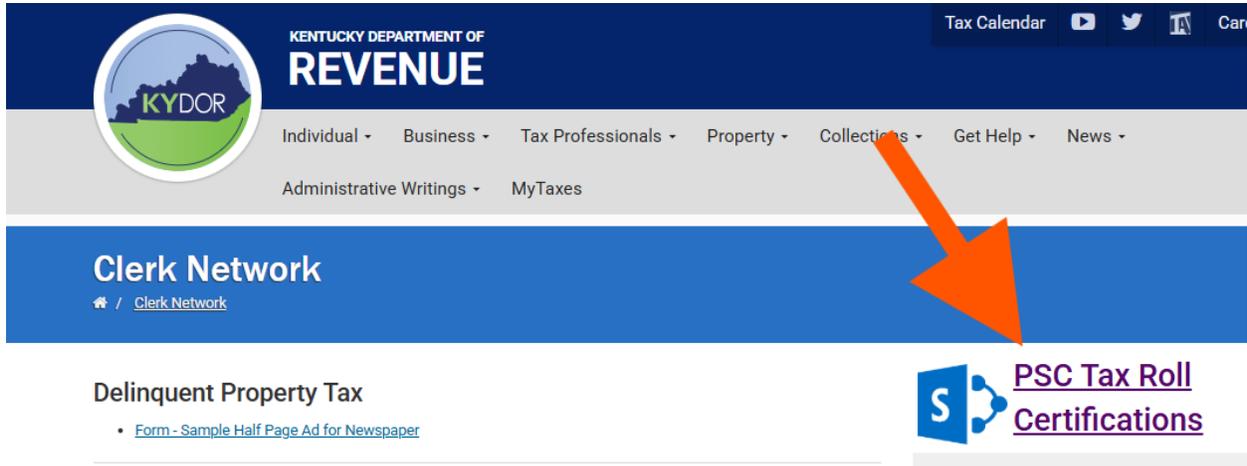

Navigating Sharepoint Site/Library

The link on the Clerk Network is directed to the main PSC Tax Roll Certifications page. Various types of settings are located on the top of the page, while the left panel contains the libraries (each county is considered a library). State Valuation staff will have access to view all county libraries, the administrator will have the ability to view/edit/remove from libraries and add/remove users, and County Clerk offices will have access to view their county's library.
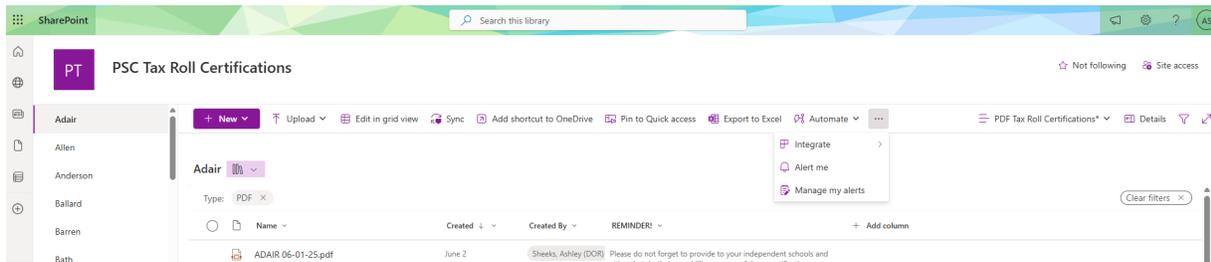
Below is an example of how the PSC Tax Roll Certifications page will appear.
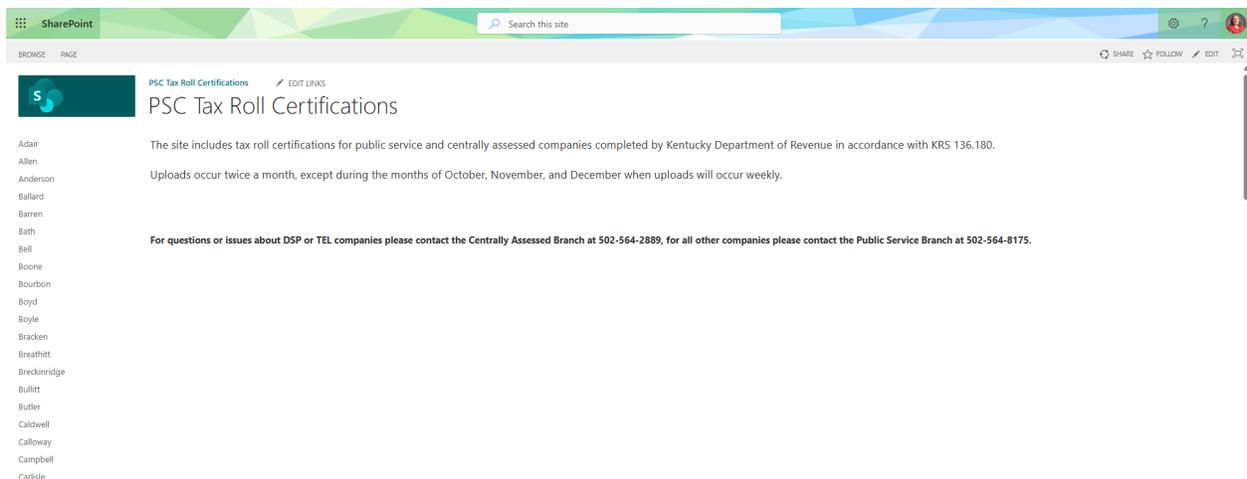
Clicking on your county's name will open its library. The command bar will vary depending on the user's rights.
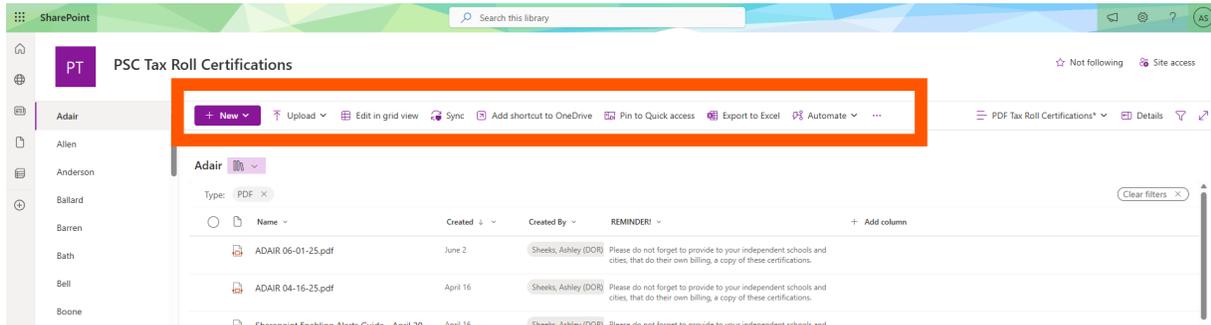

Clicking on the ellipsis (…) will show the user any other additional menu items that do not appear.

File names will typically be in the format of COUNTY NAME DATE, only under special circumstances will a file name change. While rare, State Valuation may use the Sharepoint site to upload any memos or instructions pertaining to certifications.

Users can sort and filter categories, this can be helpful when trying to locate a specific file. It's easiest to sort/filter by date. By clicking on the caron (∨) next to Created the user can choose to sort by age or Filter By.
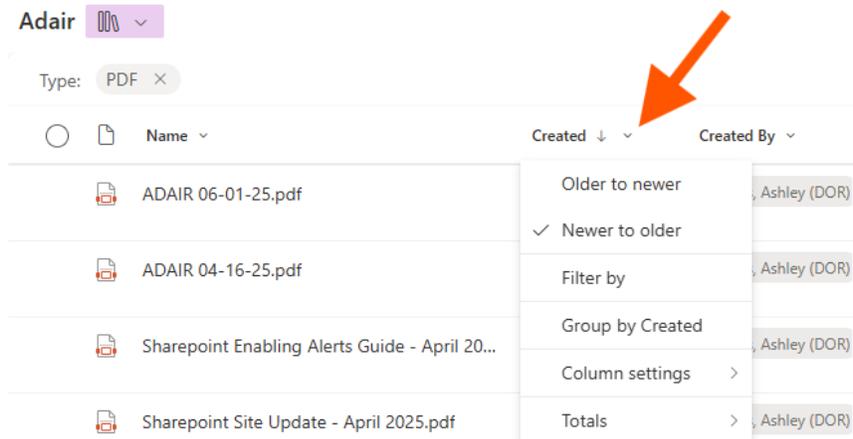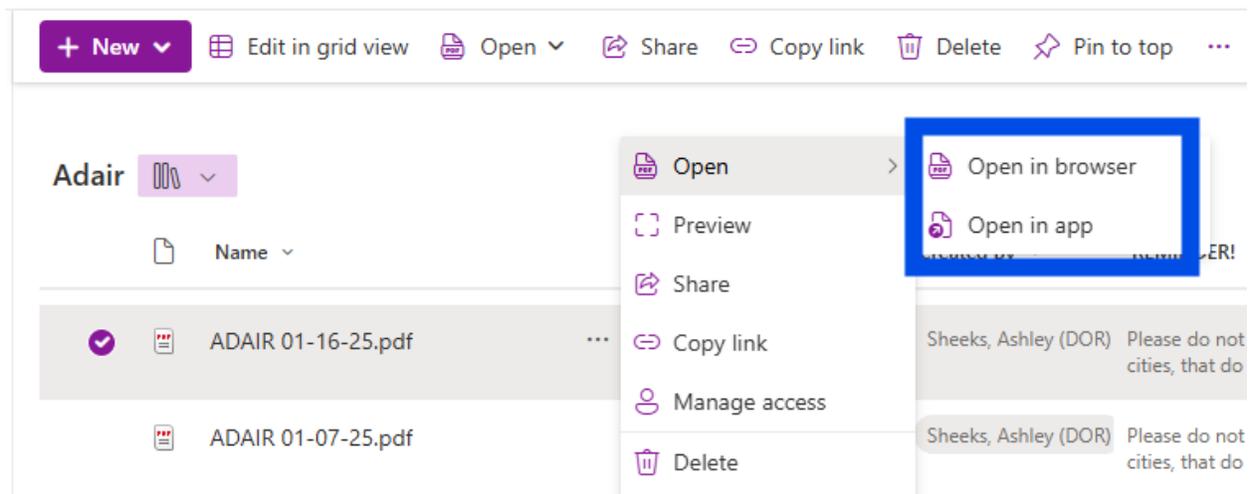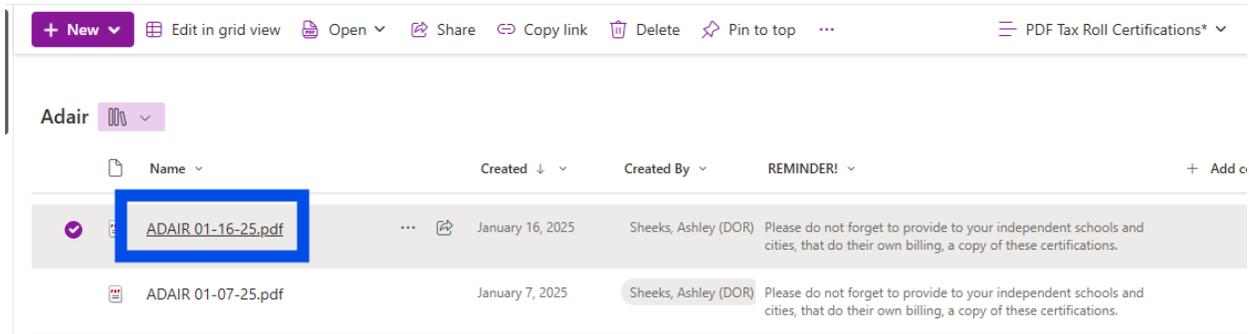
Viewing, Downloading, & Printing Files

You can view, download, or print files directly from the Sharepoint Library.
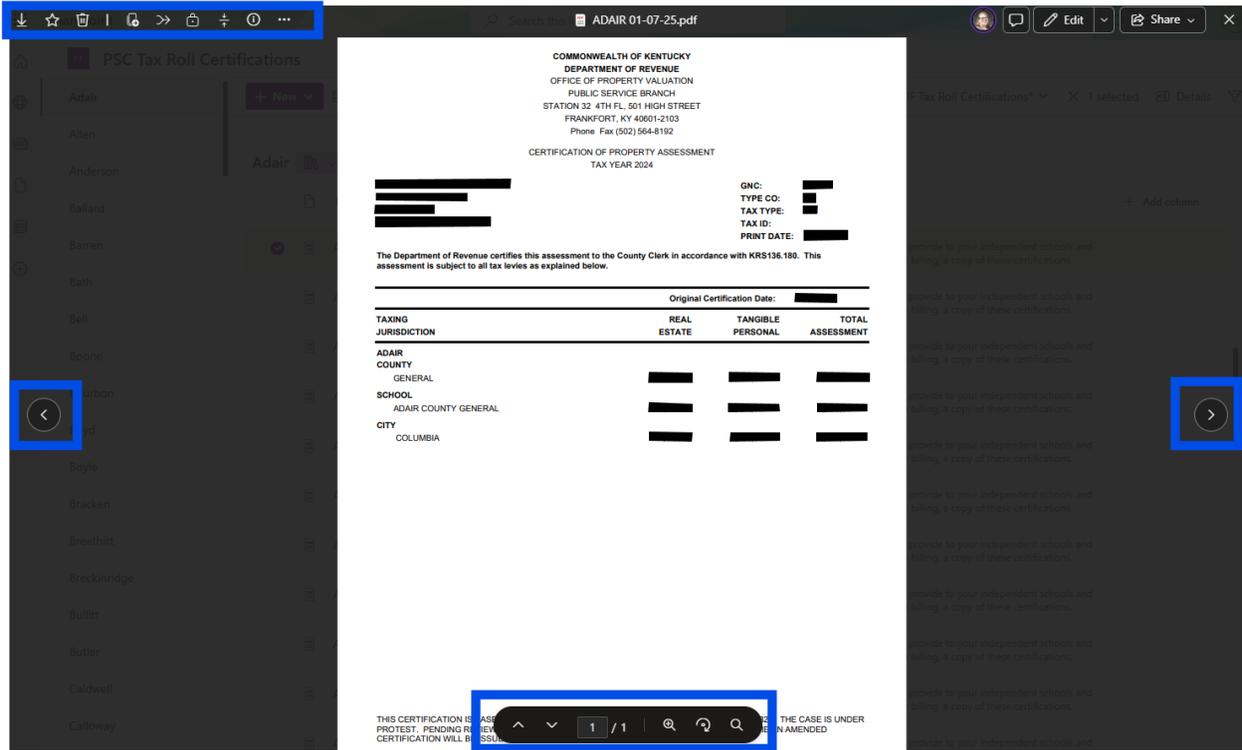
Viewing Files

To view either click the file name or click the ellipses and select *Open* this allows the choice to open in browser or app if you have a PDF Reader installed on your computer.

The image below is an example of a file opened in the browser.


The menu bar options will vary based on user access.

The Previous (left) and Next (right) buttons allow the user to move to the next or previous file from the main list of files.

The bar on the bottom includes a page count for the file.
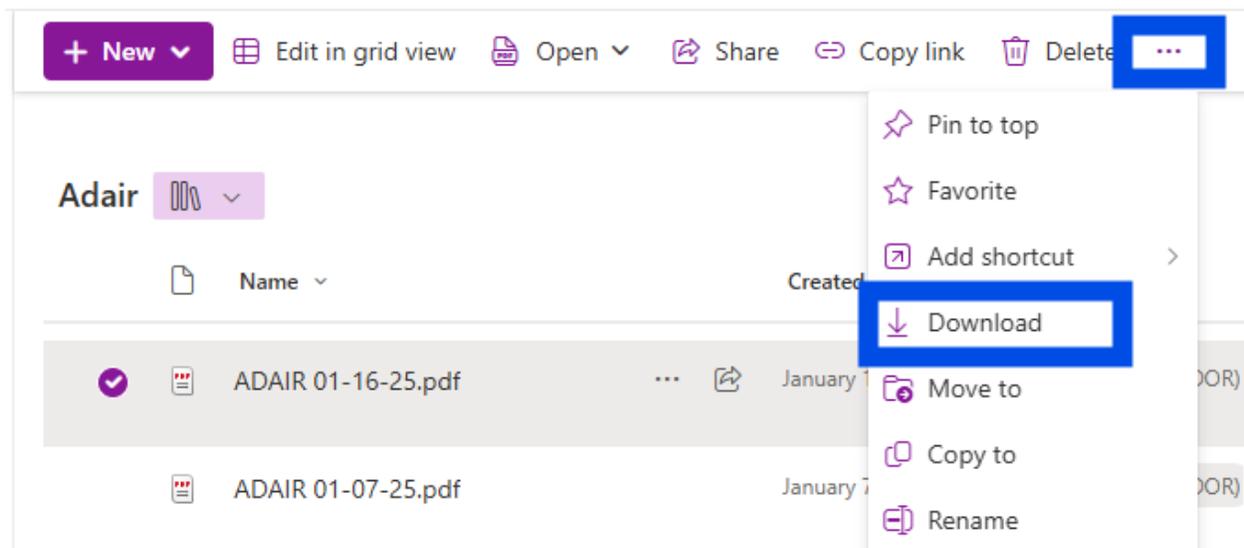
Downloading Files

Files can be downloaded from either the library or from the file itself.

From the library, select the file(s) to download, if download is not visible in the command bar click on the ellipses and select download.
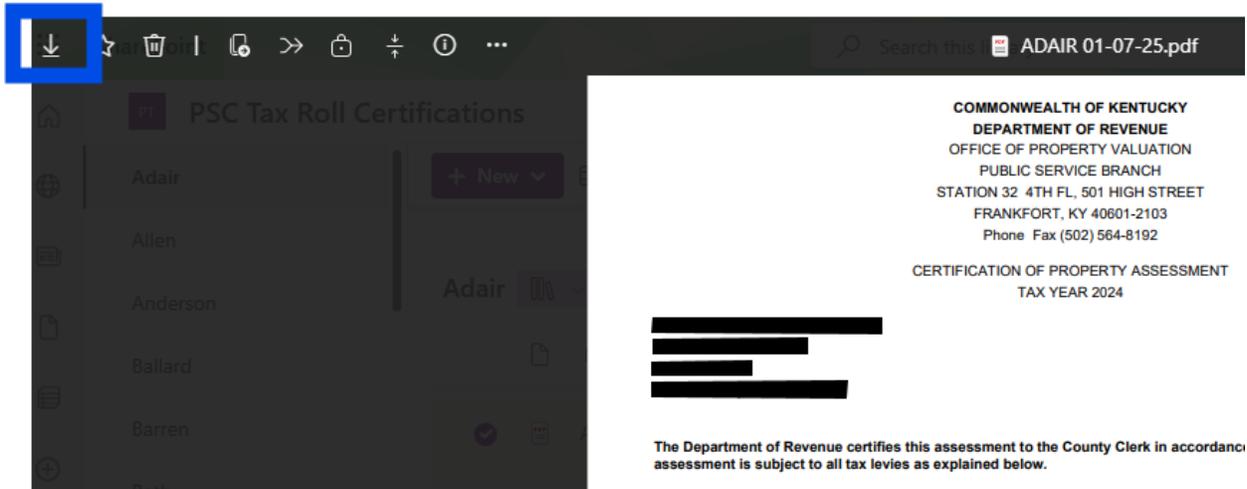
If *Download* appears in the command bar.
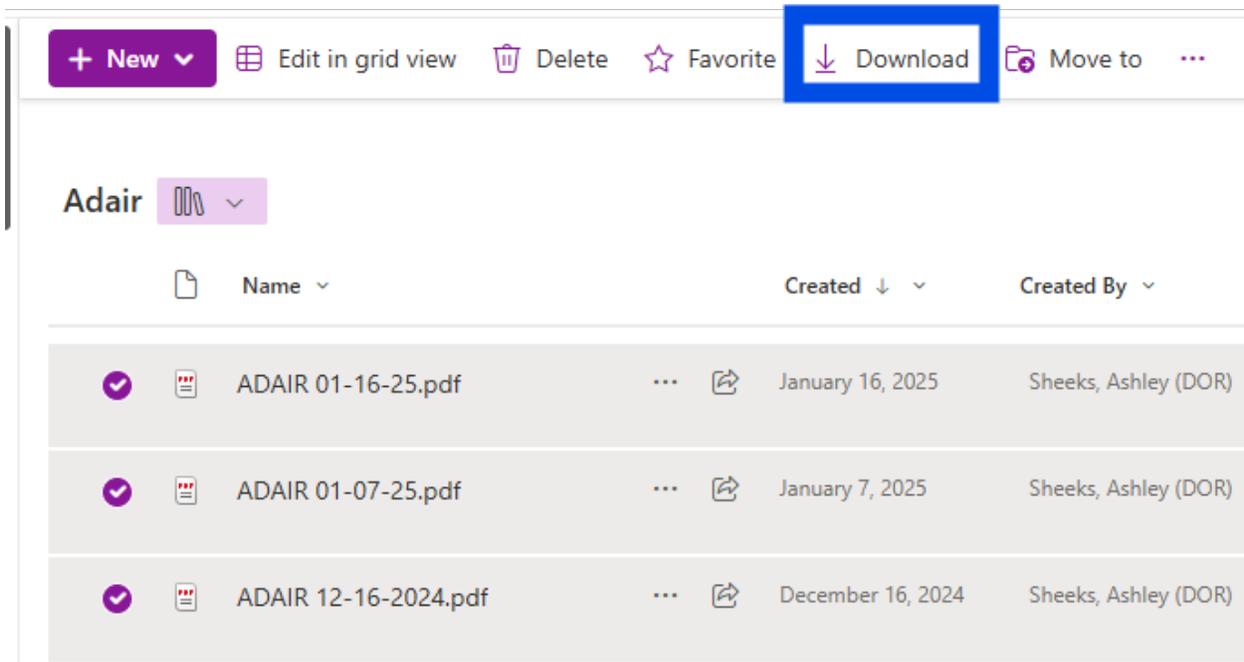
If *Download* is not visible but within the additional commands.

When the file is open the menu bar on the top left has a download icon.

Files downloaded will go to the Downloads folder on your computer.

Printing Files

Only one file can be printed at a time. Open the file you wish to print, the print icon should appear in the menu on the upper left; however, depending on browser size or user options it may be accessed through the ellipses.
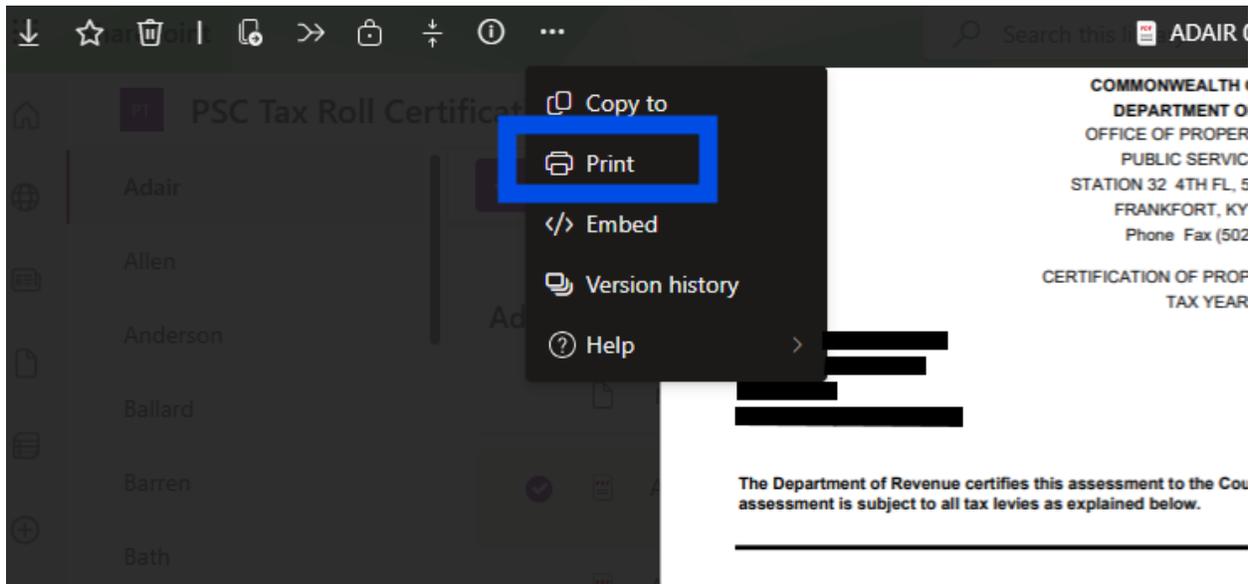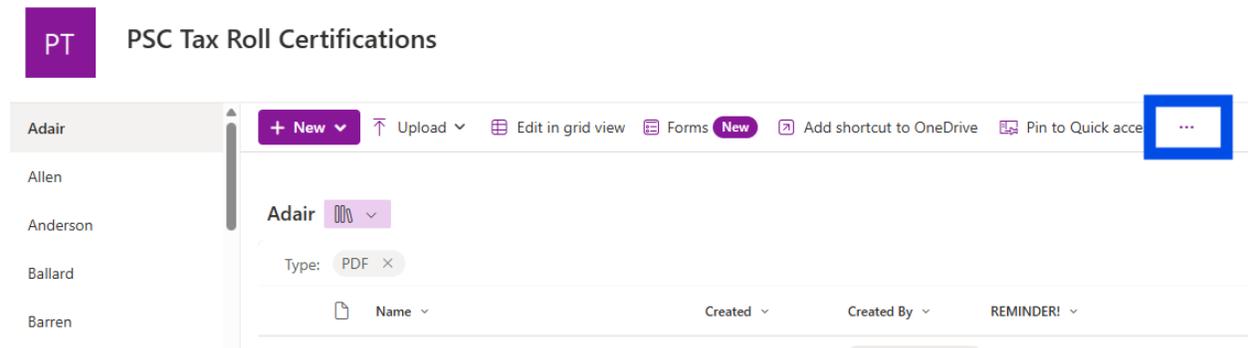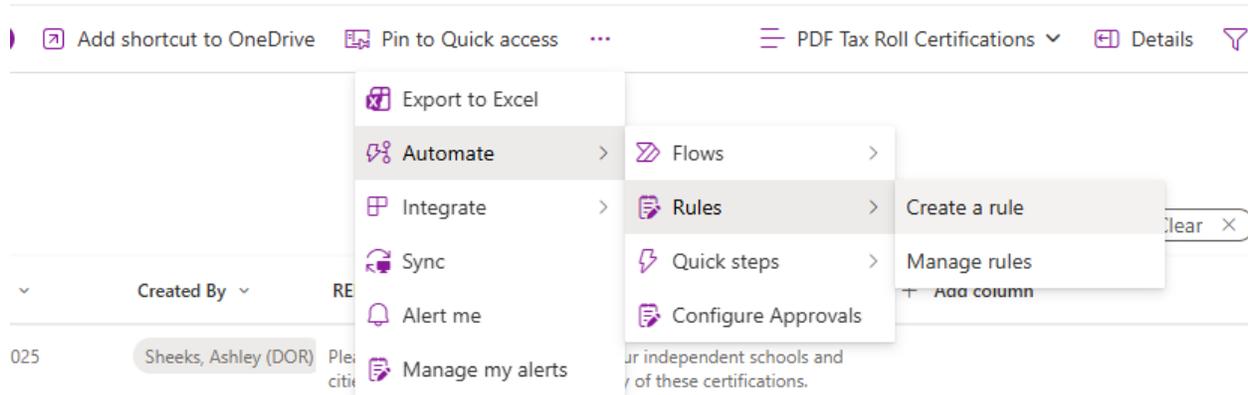
Rules

Enabling Rules

Microsoft is retiring the Enabling Alerts feature in July 2026. Rules are a replacement to Alerts. Both are similar in that an email is sent to a user to notify them of changes to the Sharepoint library. Note one major difference: rules will not include a link to the file added, only that a file was added.

To set up a rule open the Sharepoint library where your county's files are stored and click on the ellipses in the commands area.
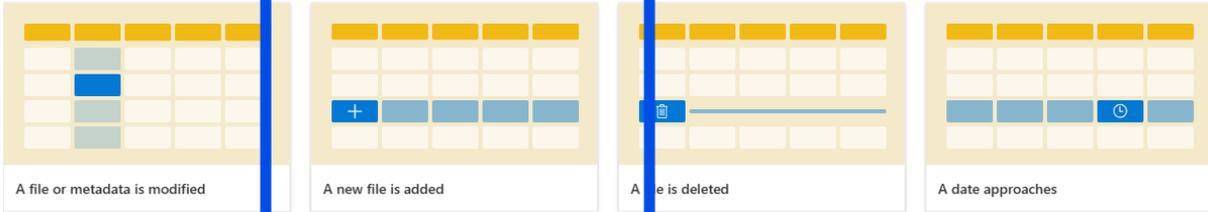

Click on *Automate > Rules > Create a rule*

Select *A new file is added*

Create a rule   ✕

Create rules to take action when data changes in this document library. Choose a condition that triggers the rule and the action that the rule will take. Learn more about rules

Take action when

| A file or metadata is modified | A new file is added | A file is deleted | A date approaches |

Set conditions and input email addresses. Previously with Alert, it was required that each user set up an alert, however with Rules one user can login and have setup one Rule for multiple email addresses to be notified.

Create a rule   ✕

Set up a rule that runs when a new file is added.

When a new file is added,
always ˅

send an email to ˅ | SA Sheeks, Ashley (DOR) ✕ | Enter a name or email address

Add a custom message ⓘ

Enter custom message text

Create | Back

(Recommended selections are **always** and **send an email to**.

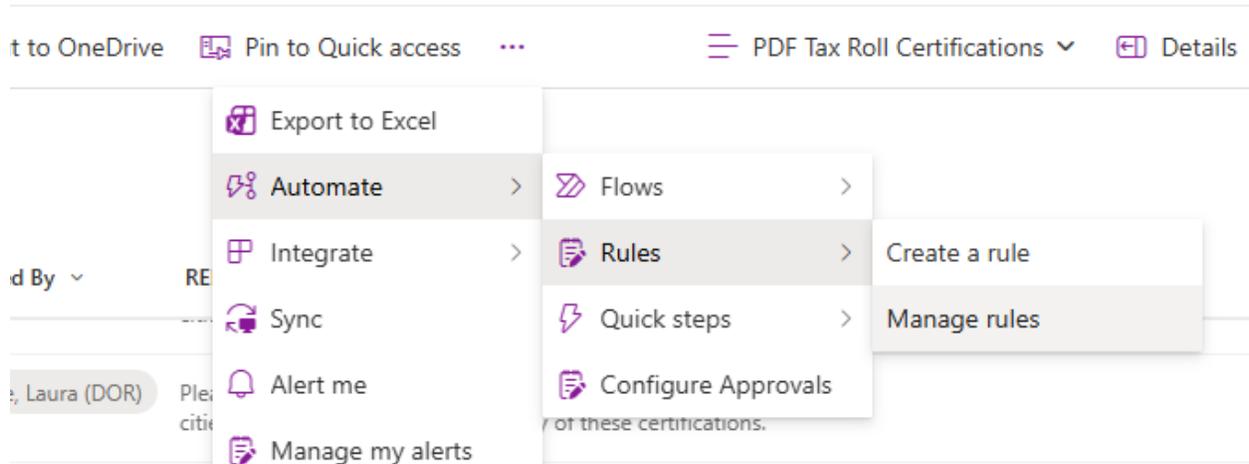When files are added to the Sharepoint library an email like the example below will be received.

Deleting or Editing a Rule

To Manage a rule, open the Sharepoint library where your county's files are stored and click on the ellipses in the commands area.

Click on *Automate > Rules > Manage rules*

This screen will display all the current rules for the Sharepoint library, note that each library can have 15 rules. On this screen rules can be turned off/on, edited, or deleted.

Click on the rule you wish to manage. A screen will appear that allows you to edit the rule and save or click on Delete rule in the bottom left of the screen.

Edit rule ✕

Set up a rule that runs when a new file is added.

When a new file is added,
always ⌄
send an email to ⌄   Me

Add a custom message ⓘ

Enter custom message text

🗑 Delete rule   Save   Cancel